Chapter

11

Receiving Module

The Receiving module allows you to receive items ordered using Purchase Orders. This Chapter describes how to use the Web Work, Receiving module.

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1.1 Overview of the Receiving Module

The Receiving module is used to receive inventory orders. You can view a list of all outstanding purchase orders or you can filter the information based on the Purchase Order or Vendor code.

Click on the RECEIVING button on the left hand side of the screen to access the Receiving module.

When you enter the Receiving module you will be in Query mode as pictured below:
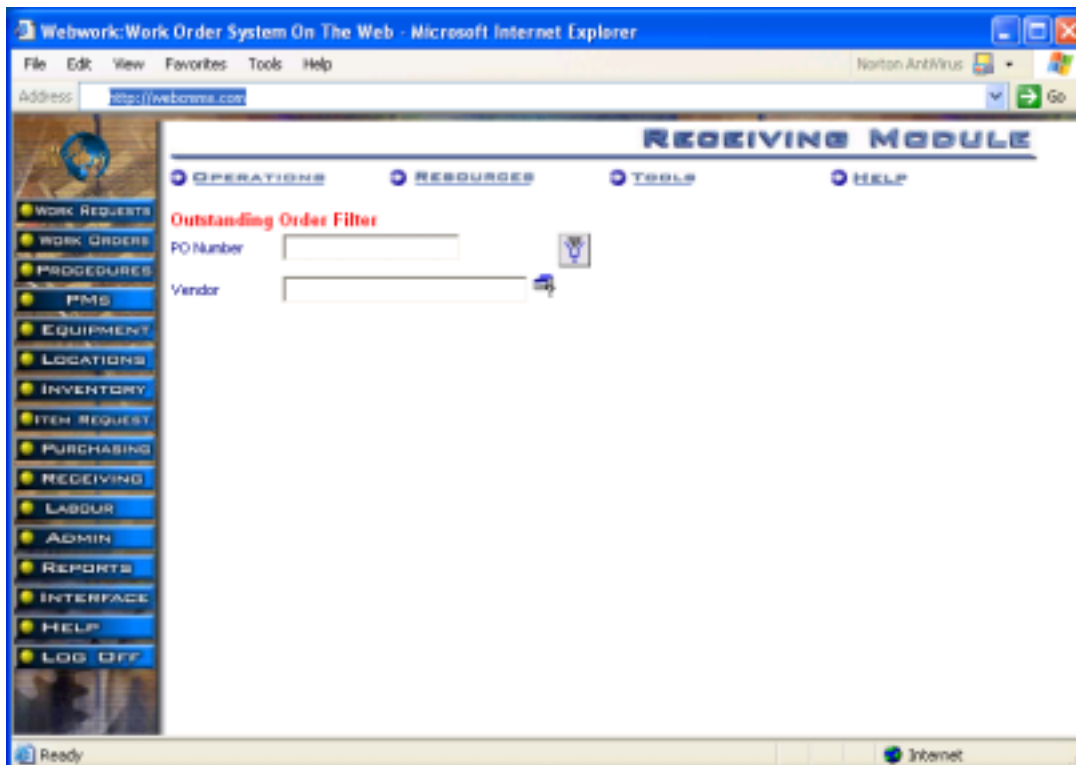
The TOOLS ⊃ TOOLS and HELP ⊃ HELP drop down menus contain the various features available in the Receiving module.
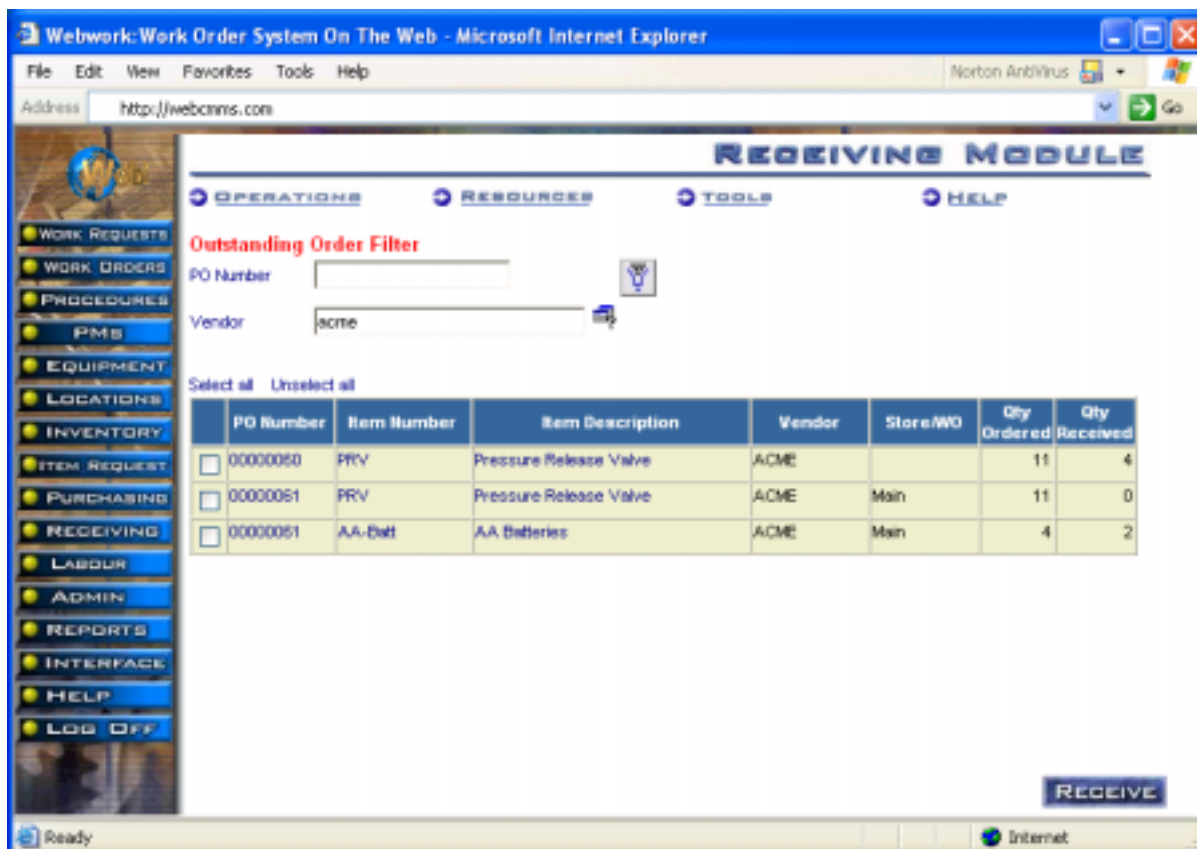
Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

2.1   Receiving Order Items Individually

To receive order items individually:

- Click on the RECEIVING button ⬤ **RECEIVING** on the left hand side of the screen to access the Receiving module.

- Enter selection criteria into the PO # or Vendor field and press the enter key on your keyboard.

- A table showing outstanding orders, which match the criteria, you selected will appear on the screen as pictured below:

- Open the applicable item by clicking on the PO, Item or Description field.

  The Order Receiving window as pictured below will open:

- Enter the quantity of the item received. This can be different than the quantity ordered. Click on the tab key to continue. This will calculate the sub-total field and then move you to the Storeroom or Work Order field, depending on which one this item was ordered for.

- Enter Receipt Document and Document No into the applicable fields.

- Click on the RECEIVE button **RECEIVE** to receive these items into inventory and return you to the receiving screen.

3.1 Receiving Complete Orders

- Click on the RECEIVING button **🔴 RECEIVING** on the left hand side of the screen to access the Receiving module.

- Enter selection criteria into the PO # or Vendor field and press the enter key on your keyboard.

- A table showing outstanding orders, which match the criteria, you selected will appear on the screen.

- Open the applicable item by clicking on the PO, Item or Description field.

- Click on the RECEIVE button **RECEIVE** .

- The Order Receiving window as pictured below will open.


- Enter Receipt Document and Document No into the applicable fields.

- Click on the RADIO button ⭕ beside Direct Issue or Staging Area if applicable.

- Click on the RECEIVE button **RECEIVE** to receive these items into inventory and return you to the receiving screen. The items received will be added into inventory as specified on the PO and removed from the Receiving screen.

4.1   Receiving – Reports

To access Receiving reports click on the ⟳ TOOLS menu and
select Reports from the drop down menu. This will open the Purchasing
Reports screen. Purchasing and Receiving reports are listed in the same
screen.

TOOLS
Reports .....
Links .....

A screen similar to the one shown below will open:
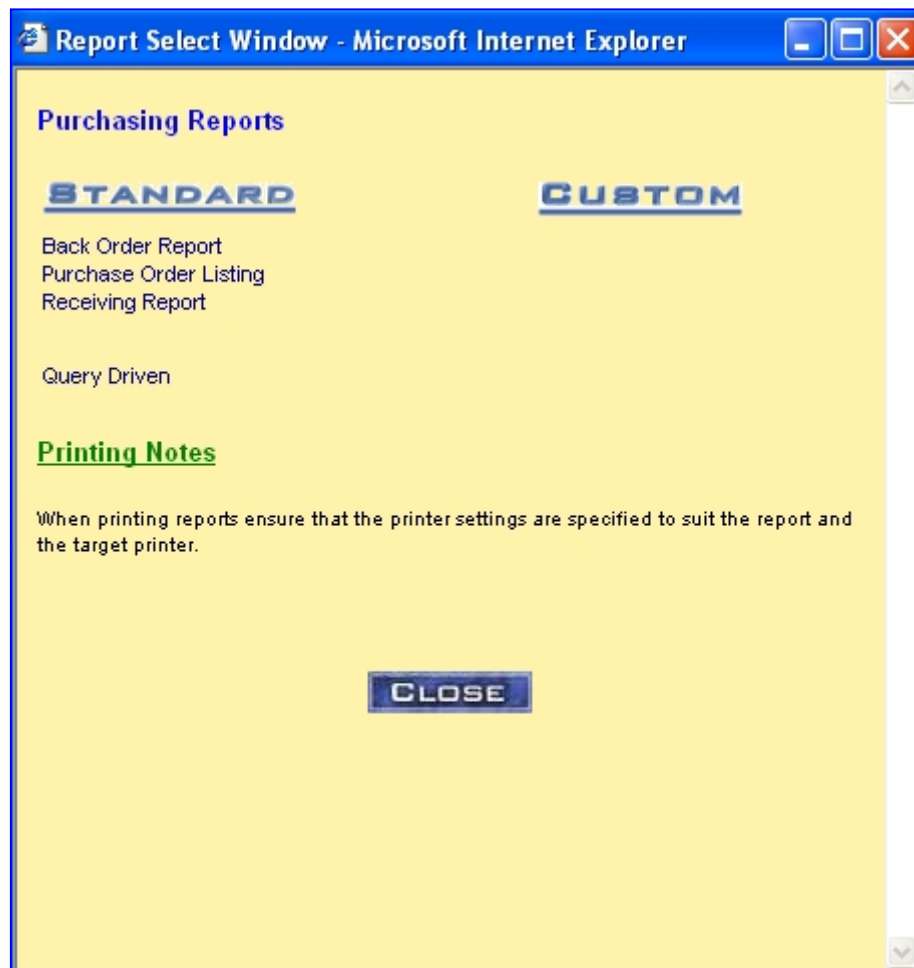
Click on any of the Reports listed under Standard or Custom, to open them.

Only reports applicable to the Receiving module will be displayed. To view all reports, click on the
REPORTS module button ● REPORTS on the left hand side of the Web Work screen. For
more information about reports, see the Reports section of this manual.

4.1.1. <u>Creating Receiving Reports</u>

Reports cannot be created in the Receiving module. To create a receiving report click on the REPORTS module button ![REPORTS] to access the report writer and create the report.

4.1.2. <u>Printing Receiving Reports</u>

Receiving reports can be printed from the Receiving module or from the Reports module.

To print a report in the Receiving module:

- Open the Receiving module.

- Click on the ![TOOLS] menu and select reports from the drop down menu.

- Select the report you wish to print by clicking on its title.

  The report will open in Preview mode.

- Click on File and select Print from the drop down menu to print the report.

5.1 Links

When you are in the Receiving module and you select Links from the ![TOOLS] menu, the Web Work Create/Edit Links window will open as shown below.

You can view existing links or create new links using this feature.

For information on creating new links see the Links section of this manual.

You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.